**Department of Energy**
Washington, DC 20585

**Order No. 202-26-17**

Pursuant to the authority vested in the Secretary of Energy by section 202(c) of the Federal Power Act (FPA),[1] and section 301(b) of the Department of Energy Organization Act,[2] and for the reasons set forth below, I hereby determine that an emergency exists in the PJM Interconnection, L.L.C. (PJM) region due to a shortage of electric energy, a shortage of facilities for the generation of electric energy, and other causes. Issuance of this Order will meet the emergency and serve the public interest.

*BACKGROUND*

The Eddystone Generating Station is a power plant owned by Constellation Energy Corporation (Constellation Energy) and located in Eddystone, Pennsylvania. Units 3 and 4 (Eddystone Units), each with 380 MW of generation capacity, are subcritical steam boiler-turbine generator units that can run on either natural gas or oil, depending on market conditions. The Eddystone Units were initially scheduled for retirement on May 31, 2025.

Order Nos. 202-25-04 and 202-25-08, issued pursuant to FPA section 202(c), each required that the Eddystone Units remain in operation for 90 days, until August 28, 2025, and November 26, 2025, respectively. Subsequently, Order No. 202-25-10, issued pursuant to FPA section 202(c), required the Eddystone Units to remain in operation for 90 days, until February 24, 2026. Those orders were based on my determination that emergency conditions existed in the PJM region. I explained that there was a potential shortage of electric energy and a shortage of facilities for the generation of electric energy.[3] I stated that the potential loss of power to homes and local businesses presents a risk to public health and safety.[4] I determined that continued operation and economic dispatch of the Eddystone Units was necessary to best meet the emergency and serve the public interest.[5] My determination was based on a number of different facts.

First, in congressional testimony, PJM's President and CEO stated that its system faces a "growing resource adequacy concern" due to load growth, the retirement of

[1] 16 U.S.C. § 824a(c).
[2] 42 U.S.C. § 7151(b).
[3] *See, e.g., PJM Interconnection, L.L.C. and Constellation Energy Corp.*, Order No. 202-25-10, at 7 (Nov. 25, 2025).
[4] *See, e.g., id.*
[5] *See, e.g., id.* at 8, Ordering Paragraph A.

dispatchable resources, and other factors.[6] Through 2030, PJM anticipates reliability risk from increasing electricity demand, generator retirement outpacing new resource construction, and characteristics of resources in PJM's interconnection queue.[7] Upcoming retirements, including the planned retirement of the Eddystone Units, would exacerbate these resource adequacy issues.

Second, PJM indicated that resource constraints could exist within its service territory under peak load conditions, stating that "available generation capacity may fall short of required reserves in an extreme planning scenario."[8] In its February 2023 assessment, *Energy Transition in PJM: Resource Retirements, Replacements & Risks*, PJM highlighted increasing reliability risks in the coming years due to the "potential timing mismatch between resource retirements, load growth and the pace of new generation entry" under "low new entry" scenarios for renewable generation.[9]

Third, in December 2024, PJM filed revisions with the Federal Energy Regulatory Commission (FERC) to Part VII of its Open Access Transmission Tariff, known as the Reliability Resource Initiative (RRI), to address near-term resource adequacy concerns. In a February 2025 order, FERC accepted the revisions and found "the possibility of a resource adequacy shortfall driven by significant load growth, premature retirements, and delayed new entry."[10]

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[6] *Keeping the Lights On: Examining the State of Regional Reliability: Hearing Before the Subcomm. on Energy of the H. Comm. on Energy & Com.*, 119th Cong., at 4-5 (Mar. 25, 2025) (testimony of Mr. Manu Asthana, President and CEO of PJM) (Asthana Test.), https://www.congress.gov/119/meeting/house/118040/witnesses/HHRG-119-IF03-Wstate-AsthanaM-20250325.pdf.

[7] *Id*. *See also PJM Interconnection, L.L.C.*, 190 FERC ¶ 61,084, at P 15 (2025) (*PJM Interconnection*) (PJM states that, in 2023, "it found that generator retirements, load growth, the pace of new entry, and the operating characteristics of the intermittent and limited duration resources that make up a large part of PJM's interconnection queue pose increasing reliability risks through 2030.").

[8] PJM Inside Lines, *PJM Summer Outlook 2025: Adequate Resources Available for Summer Amid Growing Risk* (May 9, 2025), https://insidelines.pjm.com/pjm-summer-outlook-2025-adequate-resources-available-for-summer-amid-growing-risk/.

[9] PJM, *Energy Transition in PJM: Resource Retirements, Replacements & Risks*, at 1 (Feb. 24, 2023) (Four Rs Report).

[10] *PJM Interconnection*, 190 FERC ¶ 61,084 at P 14.

*CONTINUING EMERGENCY CONDITIONS*

The emergency conditions that necessitated the issuance of Order Nos. 202-25-04, 202-25-08, and 202-25-10 continue, both in the near and long term.[11] The production of electricity from the Eddystone Units will continue to be a critical asset for maintaining reliability in PJM. According to data from the U.S. Environmental Protection Agency, the Eddystone Units generated 26,971 MWh between June 2025 and December 2025,[12] providing vital generation capacity to the region. Over the summer of 2025, PJM took action to manage grid operations, issuing Hot Weather Alerts and/or Maximum Generation Alerts (Energy Emergency Alert (EEA) 1) to manage grid reliability covering a total of 20 days, including days in June, July, and August.[13]

PJM's resource adequacy concerns were most recently demonstrated during Winter Storm Fern, when PJM operated under a cold weather alert and declared conservative operations from January 24 – February 2, 2026. Additionally, on January 27, 2026, PJM declared a Maximum Generation Emergency/ Load Management Alert and an EEA 1.[14] Due to concerns about resource adequacy from the high demand driven by the extreme cold, PJM also applied for an order pursuant to FPA section 202(c) "that broadly authorizes all electric generating units located within the PJM Region to operate up to their maximum generation output levels, notwithstanding air quality or other permit limitations or fuel shortages during the pendency of this emergency."[15] The Department granted PJM's application and issued Order No. 202-26-02 on

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[11] Further, it likely would be difficult for the oil-fired units to resume operations once retired. Specifically, practical issues, such as employment, contracts, and permits, may greatly increase the timeline for resumption of operations during the period they are needed. If Constellation Energy were to begin disassembling the units or other related facilities, the associated challenges would be greatly exacerbated. Thus, continued operation is required in such cases so long as the Secretary determines that an emergency exists.

[12] *See Custom Data Download, EPA CAMPD* (Clean Air Markets Program Data), https://campd.epa.gov/data/custom-data-download (search criteria Emissions >> Monthly >> Unit (default) >> Apply >> *"2025" and "June, July, August, September, October, November, December."* The data can then be filtered to include only the Eddystone Generating Station.

[13] *See* PJM, *Emergency Procedures*, https://emergencyprocedures.pjm.com/ep/pages/dashboard.jsf (search range set to: effective from 06/01/2025 until 08/31/2025).

[14] *See id.* (search range set to: effective from 01/20/2026 until 02/07/2026).

[15] PJM, *Request for Emergency Order Under Federal Power Act, Section 202(c)*, at 2 (Jan. 24, 2026), https://www.energy.gov/documents/pjm-202c-application-2026-01-24.

January 25, 2026.[16] On January 29, 2026, PJM applied for an extension of Order No. 202-26-02, which was granted by the Department on the same day.[17]

PJM's resource adequacy concerns are well documented. In January 2025, PJM reached a new record peak for winter demand, exceeding the previous winter peak set in 2015.[18] PJM notes that the "20-year annualized growth rate in the 2025 Long-Term Load Forecast for the winter peak is up to 2.4%."[19] Further, PJM's risk profile continues to shift from the summer season to the winter season. For example, in a March 2025 presentation, PJM estimated that 87.8% of the expected unserved energy for the 2025/2026 delivery year falls in the winter season.[20]

The evidence indicates that there is also a potential longer term resource adequacy emergency in the PJM region. In a news release expressing support for Order No. 202-25-04, PJM explained that it has "repeatedly documented and voiced its concerns over the growing risk of a supply and demand imbalance driven by the confluence of generator retirements and demand growth. Such an imbalance could have serious ramifications for reliability and affordability for consumers."[21]

PJM has indeed voiced these concerns for years. In its February 2023 Four Rs Report, PJM cautioned that 40 GW of thermal generation are at risk of retirement by 2030.[22] PJM also noted that, while there were then 290 GW of renewable generation capacity in the PJM interconnection queue, historically, the rate of completion for

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[16] *PJM Interconnection, L.L.C.*, Order No. 202-26-02 (Jan. 25, 2026).

[17] *PJM Interconnection, L.L.C.*, Order No. 202-26-02A (Jan. 29, 2026).

[18] PJM Inside Lines, *Jan. 22 Update: Extreme Cold Produces PJM Record for Winter Electricity Demand* (Jan. 22, 2025), https://insidelines.pjm.com/jan-22-update-extreme-cold-produces-pjm-record-for-winter-electricity-demand/.

[19] PJM Inside Lines, *2025 Long-Term Load Forecast Report Predicts Significant Increase in Electricity Demand* (Jan. 30, 2025), https://insidelines.pjm.com/2025-long-term-load-forecast-report-predicts-significant-increase-in-electricity-demand/.

[20] PJM Resource Adequacy Planning Special Planning Committee, *2026/27 BRA IRM, FPR, and ELCC Class Ratings: Shift Towards More Winter Risk*, at 8 (Mar. 13, 2025), https://www.pjm.com/-/media/DotCom/committees-groups/committees/pc/2025/20250313-special/2026-2027-irm-fpr-elcc-and-winter-risk.pdf.

[21] PJM Inside Lines, *PJM Statement on the U.S. Dept. of Energy 202(c) Order of May 30* (May 31, 2025), https://insidelines.pjm.com/pjm-statement-on-the-u-s-department-of-energy-202c-order-of-may-30/. Further, PJM concluded, "In light of these concerns, PJM supports the U.S. Department of Energy's Order, issued May 30, pursuant to Section 202(c) of the Federal Power Act, to defer the retirements of certain generators operating in PJM's footprint . . . ." *Id*.

[22] Four Rs Report at 2.

renewable projects is approximately 5%.[23] PJM determined that the pace of new capacity additions "would be insufficient to keep up with expected retirements and demand growth by 2030."[24] PJM estimated that, depending on the pace of new capacity additions, reserve margin erosion would occur between 2026 and 2028.[25]

In its December 2024 RRI filing with FERC, PJM stated that "[c]oncerns about resource adequacy . . . have only increased since the Four Rs Report . . . ."[26] PJM warned that its "resource adequacy concerns are increasing at an extraordinary pace."[27] PJM went on to explain that its "resource adequacy concerns are driven in large part by significant load growth caused by, among other things, large data centers," and that its preliminary analysis shows "substantial increases [in load additions] since the 2024 forecast" for both the summer and winter seasons.[28] According to PJM, "load growth and generator retirements are significantly outpacing the entry of new generation in the PJM Region with this trend expected to continue unabated based on all available evidence."[29] Although the RRI process will help expedite the construction of needed new capacity, it is unlikely to result in the addition of any new generation capacity in the next few years.[30]

In support of the RRI filing, PJM submitted an affidavit from Donald Bielak, PJM's Director, Interconnection Planning. Mr. Bielak characterized the increase in forecasted load growth throughout PJM as "extraordinary" and "unprecedented," stating that it "could not have been foreseen as recently as a year ago."[31] Mr. Bielak expressed the opinion that the "rapid" retirement of thermal generation resources, "extreme" forecasted load growth, and "delays in new generation resources achieving commercial operation," would adversely affect resource adequacy throughout PJM's electricity grid.[32]

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[23] *Id*.

[24] *Id.* at 16, Table 1.

[25] *Id*.

[26] PJM, *Tariff Revisions for Reliability Resource Initiative*, FERC Docket No. ER25-712, at 10 (Dec. 13, 2024).

[27] *Id*.

[28] *Id.* at 10-11. *See also id.* at 13 ("the exponential load growth resulting from development of new data centers and the intense energy needs of Artificial Intelligence technology overshadows any relaxation in the pace of fossil fuel generation retirements . . . .").

[29] *Id.* at 14.

[30] *See id.*, Attachment C (Affidavit of Mr. Donald Bielak), at PP 18-19 (explaining that projects studied in Transition Cycle #2, which includes RRI projects, "could be constructed and in commercial operation by the 2029/30 Delivery Year or sooner.").

[31] Affidavit of Mr. Donald Bielak at P 10.

[32] *Id.* at P 12.

On February 11, 2025, FERC accepted PJM's RRI filing.[33] In its order on rehearing, FERC concluded that "PJM identified increasing reliability risks arising in the next few years and significant resource adequacy issues anticipated by the 2030/31 delivery year. The record supports that these resource adequacy concerns are likely to manifest."[34]

The North American Electric Reliability Corporation (NERC) has raised similar concerns. In its 2025 Long-Term Reliability Assessment, released in January 2026, NERC observes that the PJM region is at high risk of energy shortfalls over the next five years[35] and faces significant reliability challenges as "[c]urrent projections for resource additions do not keep pace with escalating demand forecasts and expected generator retirements."[36] The assessment notes that "[d]emand for electricity in PJM is growing at its fastest pace in years, driven primarily by data centers, followed by electrification and manufacturing loads;" however "[a]t the same time, PJM faces an extreme and rapid tightening of capacity resources in the near term because of generator retirements and project delays."[37] Overall, the assessment concludes that "[b]ased on the load increase and generation decrease, PJM is projecting potential reserve margin shortages during peak operating periods. As a result, there is an increased risk that emergency procedures may be required to meet load and reserve requirements."[38]

Order Nos. 202-25-04, 202-25-08, and 202-25-10 were preceded by executive orders on January 20, 2025, and April 8, 2025, in which President Donald J. Trump underscored the dire energy challenges facing the nation due to growing resource adequacy concerns. President Trump declared a national energy emergency in Executive Order 14156, *Declaring a National Energy Emergency*, in which he determined that the "United States' insufficient energy production, transportation, refining, and generation constitutes an unusual and extraordinary threat to our nation's economy, national security, and foreign policy."[39] The Executive Order adds, "hostile state and non-state foreign actors have targeted our domestic energy infrastructure, weaponized our reliance on foreign energy, and abused their ability to cause dramatic swings within international

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[33] *PJM Interconnection*, 190 FERC ¶ 61,084 at P 263.

[34] *PJM Interconnection, L.L.C.*, 192 FERC ¶ 61,085, at P 25 (2025).

[35] NERC, *2025 Long-Term Reliability Assessment*, at 7, Figure 1 (Jan. 2026), https://www.nerc.com/globalassets/our-work/assessments/nerc_ltra_2025.pdf.

[36] *Id.* at 8.

[37] *Id.* at 16.

[38] *Id.* at 91.

[39] Exec. Order No. 14156, 90 Fed. Reg. 8433 (Jan. 20, 2025) (*Declaring a National Energy Emergency*), https://www.whitehouse.gov/presidential-actions/2025/01/declaring-a-national-energy-emergency/.

commodity markets."[40] In a subsequent Executive Order 14262, *Strengthening the Reliability and Security of the United States Electric Grid*, President Trump emphasized that "the United States is experiencing an unprecedented surge in electricity demand driven by rapid technological advancements, including the expansion of artificial intelligence data centers and increase in domestic manufacturing."[41]

Further, the Department detailed the myriad challenges affecting the nation's energy systems in its July 2025 "Resource Adequacy Report: Evaluating the Reliability and Security of the United States Electric Grid," issued pursuant to the President's directive in Executive Order 14262. The Department concluded that "[a]bsent decisive intervention, the nation's power grid will be unable to meet projected demand for manufacturing, re-industrialization, and data centers driving artificial intelligence (AI) innovation."[42] The prolific growth of data centers for the development of AI, as well as their immense energy needs, presents a new and unexpected source of load growth. For example, PPL Electric Utilities has 11.7 GW of advanced data center requests in Pennsylvania through to 2030.[43] As of December 2024, Dominion Energy has 40.2 GW of contracted data center capacity, which is an 18.2 GW increase over the amount from July 2024, an approximately 88% increase.[44] In collaboration with the national labs, the Department modeled the effects of approximately 25 GW of load growth in PJM, of which 15 GW came from data centers, as well as approximately 17 GW of announced coal, gas, and oil generation retirements.[45] Under these assumptions, the model estimated approximately 430.3 loss of load hours in an average weather year. Under worst weather year assumptions, the model estimated 1,052 loss of load hours and a maximum unserved load of approximately 21.335 GW.[46]

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[40] *Id*.

[41] Exec. Order No. 14262, 90 Fed. Reg. 15521 (Apr. 8, 2025) (*Strengthening the Reliability and Security of the United States Electric Grid*), https://www.whitehouse.gov/presidential-actions/2025/04/strengthening-the-reliability-and-security-of-the-united-states-electric-grid/.

[42] U.S. Dep't of Energy, *Resource Adequacy Report: Evaluating the Reliability and Security of the United States Electric Grid*, at 1 (July 2025) (Resource Adequacy Report), https://www.energy.gov/sites/default/files/2025-07/DOE%20Final%20EO%20Report%20%28FINAL%20JULY%207%29.pdf.

[43] *See* PPL Corporation, *PPL Corporation Q2 2025 Investor Update*, at 7 (July 31, 2025), https://filecache.investorroom.com/mr5ir_pplweb2/1245/PPL_2025_Q2_Investor_Update_vFINA L.pdf.

[44] *See* Dominion Energy Virginia, *Q4 2024 Earnings Call*, at 18 (Feb. 12, 2025), https://s2.q4cdn.com/510812146/files/doc_financials/2024/q4/2025-02-12-DE-IR-4Q-2024-earnings-call-slidesvTCII.pdf.

[45] Resource Adequacy Report at 28.

[46] *Id.* at 27.

Grid operators, including PJM, have likewise acknowledged the nation's current energy crisis. For instance, during a hearing before the United States House of Representatives Committee on Energy and Commerce on March 25, 2025, Manu Asthana, President and CEO, PJM, testified that there was a "growing resource adequacy concern . . . impacting a significant part of our country."[47] Mr. Asthana explained that the "rate of electricity demand is anticipated to increase significantly in the future due to development of large data centers in the PJM service Area . . . [and] increases in demand coming from the transportation and heating sectors and from industrial growth."[48] Mr. Asthana noted that, though various reforms instituted by PJM had succeeded in bringing new generation online and preventing the retirement of existing units, supply conditions within PJM are still tightening.[49] Therefore, Mr. Asthana stated that PJM "encourage[s] all generation owners who have signaled an intent to retire their units to reconsider their decision to support resource adequacy and grid reliability."[50]

Pursuant to section 202(c)(4)(B) of the FPA, the Department has consulted with the primary Federal agency with expertise in the environmental interest protected by the laws or regulations that may conflict with this Order. The agency did not submit additional conditions for inclusion in this Order.

## *ORDER*

FPA section 202(c)(1) provides that whenever the Secretary of the Department of Energy determines "that an emergency exists by reason of a sudden increase in the demand for electric energy, or a shortage of electric energy or of facilities for the generation or transmission of electric energy," then the Secretary has the authority "to require by order . . . such generation, delivery, interchange, or transmission of electric energy as in [his] judgment will best meet the emergency and serve the public interest."[51] This statutory language constitutes a specific grant of authority to the Secretary to require the continued operation of the Eddystone Units when the Secretary has determined that such continued operation will best meet an emergency caused by a sudden increase in the demand for electric energy or a shortage of generation capacity.

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[47] Asthana Test. at 4.

[48] *Id*.

[49] *Id.* at 9-10.

[50] *Id.* at 10.

[51] Although the text of FPA section 202(c) grants this authority to "the Commission," section 301(b) of the Department of Energy Organization Act transferred this authority to the Secretary of the Department of Energy. *See* 42 U.S.C. § 7151(b).

Such is the case here. As described above, the emergency conditions resulting from the combination of increasing demand and the capacity shortfall stemming from accelerated retirements of generation facilities supporting the issuance of Order Nos. 202-25-04, 202-25-08, and 202-25-10 will continue in the near term and are also likely to continue in subsequent years. This could lead to the loss of power to homes and local businesses in the areas affected by curtailments or outages, presenting a risk to public health and safety. Given the responsibility of PJM to identify and dispatch generation necessary to meet load requirements, I have determined that, under the conditions specified below, continued additional dispatch of the Eddystone Units is necessary to best meet the increased demand for emergency and mitigate the observed shortage of generation, thus serving the public interest pursuant to FPA section 202(c).

To ensure that the Eddystone Units will be available if needed to address emergency conditions, they shall remain in operation through May 24, 2026.[52]

Based on my determination of an emergency set forth above, I hereby order:

A. From February 24, 2026, PJM and Constellation Energy shall take all measures necessary to ensure that the Eddystone Units are available to operate. For the duration of this Order, PJM is directed to take every step to employ economic dispatch of the Eddystone Units to minimize cost to ratepayers. Constellation Energy is directed to comply with all orders from PJM related to the availability and dispatch of the Eddystone Units.

B. To minimize adverse environmental impacts, this Order limits operation of dispatched units to the times and within the parameters as determined by PJM pursuant to paragraph A. PJM shall provide a daily notification to the Department (via AskCR@hq.doe.gov) reporting whether the Eddystone Units have operated in compliance with the allowances contained in this Order.

C. All operation of the Eddystone Units must comply with applicable environmental requirements, including but not limited to monitoring, reporting, and recordkeeping requirements, to the maximum extent feasible while operating consistent with the emergency conditions.

D. By March 11, 2026, PJM is directed to provide the Department (via AskCR@hq.doe.gov) with information concerning the measures it has taken and is planning to take to ensure the operational availability of the Eddystone Units consistent with this Order. PJM shall also provide such additional information regarding the environmental impacts of this

[52] 16 U.S.C. § 824a(c)(4).

Order and its compliance with the conditions of this Order, in each case as requested by the Department from time to time.

E. Constellation Energy is directed to file with FERC tariff revisions or waivers to effectuate this Order, as needed. Rate recovery is available pursuant to 16 U.S.C. § 824a(c).

F. This Order shall not preclude the need for the Eddystone Units to comply with applicable state, local, or Federal laws or regulations following the expiration of this Order.

G. Because this Order is predicated on the shortage of facilities for generation of electric energy and other causes, the Eddystone Units shall not be considered capacity resources.

H. This Order shall be effective on February 24, 2026, through May 24, 2026, with the exception of applicable compliance obligations in paragraph D.

Issued in Washington, D.C. on this 23rd day of February 2026.

Chris Wright

Chris Wright
Secretary of Energy

cc: **FERC Commissioners**
Chairman Laura V. Swett
Commissioner David Rosner
Commissioner Lindsay S. See
Commissioner Judy W. Chang
Commissioner David A. LaCerte

**Pennsylvania Public Utility Commissioners**
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